The Environmental Industry Markets in the Czech Republic, Hungary Slovakia and Slovenia

September 2000

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September 2000

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THE ENVIRONMENTAL MARKETS IN THE CZECH REPUBLIC, HUNGARY, THE SLOVAK REPUBLIC, AND SLOVENIA

Team Canada Inc • Équipe Canada inc

EXECUTIVE SUMMARY

Market demand for environmental equipment and services in the Czech Republic, Hungary, the Slovak Republic and Slovenia is being driven primarily by the desire of these countries to join the European Union (EU). As a condition of accession, applicant countries must raise their environmental standards to meet the approximately 360 EU legislative norms.

The National Program for the Adoption of the *Acquis Communautaire* and country-specific Accession partnerships were adopted to support applicant countries in their bids for EU accession. These documents set out the priorities for further work and the supporting financial assistance available from the European Union. The accession process was formally launched in 1998.

The economies of Central and Eastern European Countries (CEECs) have undergone significant changes and are becoming increasingly decentralized. However, the legacy of years of heavy industrialization, reliance on coal in the energy industry, high subsidies on energy prices, and ineffectual environmental legislation has resulted in high levels of environmental degradation in the region.

Despite the fact that legislative changes are still in progress, there are not always sufficient funds to cover required environmental activities. Central government investment in environmental activities has declined in recent years, and funding from international and regional financial institutions is difficult to attain.

Privatization of industry has increased market demand for environmental equipment. Companies are anxious to comply with international norms in order to be able to compete on the international stage, and therefore, equipment and services to update existing water, wastewater and solid-waste treatment facilities are in high demand in Central and Eastern Europe.

Western European companies dominate the market for environmental equipment, and therefore, Canadian companies hoping to gain access to the market will have to be very proactive. A thorough investigation of the market, the engagement of an agent or distributor and, ideally, a visit to the country of interest will improve chances of successfully entering the market.

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THE ENVIRONMENTAL MARKETS IN THE CZECH REPUBLIC, HUNGARY, SLOVAKIA, AND SLOVENIA

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MARKET OVERVIEW

The main factor shaping the growth of the environmental products and services market in Central Europe is the desire for European Union (EU) accession. In March 1998, the accession process was formally launched by a meeting of the 15 EU member-state foreign ministers, the 10 Central and East European applicant countries,[1] and Cyprus. In advance of this meeting, the National Program for the Adoption of the *Acquis Communautaire* (NPAA) — hereafter referred to as "the *acquis*" — and country-specific accession partnerships were adopted to support the applicant countries in their preparations for membership. These documents set out the priorities for further work and the supporting financial assistance available from the EU.

The EU has approximately 360 legislative norms pertaining to the environment. Applicant countries are required to bring their environmental legislation in line with these norms in order to be eligible for entrance into the EU.

Czech Republic

The Czech Republic began its transformation to a market economy during the "velvet revolution" of the post-1989 years. Part of this transformation involved dealing with the serious environmental problems connected with its communist past. Heavy industrialization, reliance on coal in the energy industry, high subsidies on energy prices, and ineffectual environmental legislation are legacies of the Czech Republic's pre-1989, Soviet-dominated, state-run economy. After experiencing a period of healthy growth and low inflation, the economy consequently suffered decreases in productivity, a trade deficit, and, in 1997, growth stagnation. Despite a recession in 1998 and 1999, the economy is now recovering.

The Czech Republic's long-term strategy for environmental protection is outlined in the Act on the Environment (1991). The State Environmental Policy, which is based on this Act, was approved in 1995 and updated in April 1999. German and Dutch legislation served as the basic model for Czech regulations. Germany's legislation was followed due to its lengthy border with the Czech Republic; Dutch legislation was seen to be very progressive.

[1] The 10 EU applicant countries are Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, the Slovak Republic and Slovenia.

The Czech Republic currently spends approximately 2.4% of its gross domestic product (GDP) on environmental concerns — which is an average percentage among Organization for Economic Co-operation and Development (OECD) member countries. However, the central budget for environmental spending decreased its contribution from 44% in 1992 to less than 13% in 1999. Regional and international financial institutions (IFIs) are filling this void, especially as the realities associated with privatization are being felt by industry. Privatization, theoretically completed in the mid-1990s, has yet to be implemented in that companies need to be restructured in order to compete in international markets.

In May 1999, the Czech Republic presented a revised version of its NPAA. It establishes a schedule for implementing priorities and transitional objectives based on the first accession partnership.

The Czech Ministry of Environment was established at a relatively late date (1990), thereby reflecting the legislative situation in the European Union in the second half of the 1980s. However, the European Union has since passed many new environmental laws and amended others. It is now estimated that only about 70% of existing Czech environmental laws are compatible with those of the European Union. The EU has estimated the Czech Republic will need $15.8 billion[2] for full application of EU environmental norms. However, Bedrich Moldan, the Czech negotiator with the EU in the area of environmental protection, has given a lower estimate of $10.3 billion to conform to EU environmental standards. According to Moldan, close to $6.9 billion will be paid by the private sector, especially to large industrial companies that will be expected to comply with EU-compatible environmental legislation.

Although the considerable progress made by the Czech Republic over the past 10 years has been recognized by the European Union, the Czech Republic has been criticized for not moving quickly enough to pass new environmental laws. Despite significant advances made, more work is necessary in all areas of the environment, especially in the water and solid waste sectors. Administrative capacity and financial planning also need strengthening.

Some of the specific issues related to EU accession in the environmental arena are as follows:

- In 1999, a new State Environment Policy was approved that puts greater significance on accession than previous environmental policy did.

[2] All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on IDD Information Services, *Tradeline*, January 2000.

- Regarding water protection, legislation has been passed that harmonizes some parameters used to measure water quality and incorporates the "polluter pays" principle (PPP). However, no progress has been reported on framework legislation, which is seen as imperative.

- Regarding waste management, specific legislation concerning packaging and returnable products has been passed, but no progress has been made on framework legislation. There has also been no progress on legislation for hazardous waste management, which is critically needed.

- Regarding air quality protection, although great reductions have been achieved in emission levels, in order to comply with the *acquis*, the Czech Republic will have to redouble its efforts. Legislation regarding noise emissions has yet to be adopted.

Water and Wastewater Treatment

In order to comply with the *acquis* for EU accession, the Czech Republic's fragmented water and wastewater environmental legislation will have to be amalgamated into one all-encompassing framework. This subsector is expected to experience the most legislative change.

Great progress in the wastewater sector has been made in the Czech Republic. Currently, over 89% of the country's population is connected to the main water supply system and 75% is connected to the main sewer system.

Table 1. Total Water- and Wastewater-treatment Equipment: Market Engineering Measures for the Czech Republic, 1999

Measurement Name	Measurement	Trend
Market size (1999)	$966 million	I
Annual market growth rate (1999)	7.6%	D
Compound annual growth rate (1999-2006)	6.5%	
Price range for water-treatment equipment	$15,000 to $375,000	S
Price range for wastewater-treatment equipment	$15,000 to $1.5 million	S
Population connected to main water supply	89%	I
Population connected to main sewage system	75%	I
Population connected to biological treatment system	20-30%	I
Replacement rate (average period of unit replacement)	10-15 years	S
Market concentration*	17%	I
Number of competitors (1999)	20-25	S
Number of existing water-treatment plants	600	I
Number of existing wastewater-treatment plants	900	I
Market forecast (value in 2006)	$1 billion	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1999 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *European Central and Eastern European Water and Wastewater Treatment*, April 17, 2000.

Virtually all municipalities with over 5000 inhabitants have two-stage treatment plants, and investments are now being directed toward smaller communities of 2000 to 5000 inhabitants. Although a few large plants are expected to be built, it is estimated that 150 new small and medium-sized plants will be constructed. Demand for wastewater-treatment equipment and technologies is expected to rise considerably over the next few years.

Water infrastructure in the Czech Republic is antiquated and over 30% of water is lost through leakage during transport through the water network. Although this is in line with EU averages, leakage rates vary from 16% in North Moravia to 45% in Prague. In 1999, water consumption for domestic purposes was 113 litres per capita per day.

There are currently about 25 companies in the water and wastewater-treatment market. There is intense competition in the market, with price being the most important purchasing factor, followed by level of technology, availability of technical support and favourable financing terms.

Municipalities are by far the largest end users of water and wastewater-treatment equipment. Fully 76% of revenues for water treatment and 79% of wastewater revenues come from municipalities, while industry is responsible for 24% of revenues in the water-treatment sector and 21% in the treatment of wastewater.

Table 2. Market for Water Pollution Control Equipment in the Czech Republic ($ millions)

	1996	1997	1998
Local Production	401.1	624	928.6
Imports	208	222..8	245.1
Exports	14.9	29.7	59.4
Total Market	594.2	817.1	1114.3

Source: U.S. Department of Commerce, National Trade Data Bank. *Water Pollution Control Equipment – Czech Republic*, October 1, 1997.

The main market drivers in the water and wastewater sector are the expected first tier accession to the EU by the Czech Republic; the new state environment policy; rising environmental awareness and increased financial returns; and successful transformation to a market economy.

Market restraints are the lack of financial support and inefficient disbursement of resources. The state budget for water and wastewater projects has decreased, and 57% of projects rely on financing from the EU and other sources. Further, lack of an administrative framework results in ineffective allocation of resources due to a lack of ability to prioritize projects.

Solid-waste Treatment

The 1998 Waste Management Act was introduced to bring the Czech Republic's waste-management legislation in line with those of the European Union. The Act outlines regulations on waste treatment and disposal, and implements the PPP. The Act is scheduled to be updated later this year.

The Czech Republic has made solid-waste management one of its top priorities until at least 2005. The Republic is not only dealing with newly generated waste; it continues to tackle the problem of waste left over from its Soviet-dominated past, and must address the matter of hazardous waste caches deposited throughout the country. Landfill sites used by heavy industry in the pre-1989 era are seriously contaminated because large industrial companies, which operated their own landfills, tended to ignore existing legislation. This situation presents potential opportunities for Canadian companies with expertise in hazardous waste management.

By 2005, market revenues for waste management are expected to rise by 19.8% to $415 million. It is expected that demand for waste incineration will rise even though the cost of using this method will remain considerably higher than landfill.

The Ministry of Environment reports that about 90 million tonnes of waste are generated each year: industrial waste (which accounts for 39 million tonnes a year); waste from energy-generating processes (13 million tonnes); waste generated by mining activities (5 million tonnes); waste from agriculture and forestry activities (6.5 million tonnes); urban waste (2.5 million tonnes); and 24 million tonnes of other waste (including 8 million tonnes of toxic and noxious waste). In 1991, there were 8536 unsecured landfills in the Czech Republic; this number was reduced to 1270 by 1996, though less than 25% of these met 1996 standards. Landfills represent the cheapest method of waste disposal, and the Czech Republic, like other European countries, is very reliant on them. However, landfill prices are expected to rise in an effort to discourage over-reliance on this method of waste disposal.

Table 3. Total Municipal Waste-management Services Market: Market Engineering Measures in the Czech Republic, 1999

Measurement Name	Measurement	Trend
Market size	$205 million	I
Market size (tonnes)	3 million	I
Annual market growth rate (1998)	8.4%	D
Compound annual growth rate (1998-2005)	10.5%	
Average collection price	$22 per tonne	S
Average biological price	$67 per tonne	S
Average thermal price	$74 per tonne	S
Average landfill price	$18 per tonne	I
Market concentration*	15.8%	I
Number of competitors (1998)	1000	D
Degree of privatization	25%	I
Number of treatment sites	178	D
Population served by regular municipal collection	78%	I
Market forecast (value in 2006)	$415 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1998 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Table 4. Total Municipal Waste-management Services Market: Revenue Forecasts for the Czech Republic, 1995-2005

Year	Revenue ($ million)	Revenue Growth (%)	Year	Revenue ($ million)	Revenue Growth (%)
1995	172	—	2000	223	4.6
1996	180	4.1	2001	236	6.4
1997	190	5.8	2002	261	10.8
1998	205	8.4	2003	296	12.7
1999	212	3.4	2004	346	17
			2005	415	19.8

Note: All figures are rounded.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Improvements in environmental equipment and management have led to a decline in waste generation, and thus, a slowing of the rate of growth in this area. Volumes of waste in the Czech Republic are generally considered too small to make recycling projects economically attractive unless project funding is provided by municipalities.

Approximately 15% to 20% of total waste is recycled in the Czech Republic. It is expected that this percentage will rise over the next few years as more legislation is put in place regarding the disposal of recyclable products. For example, approximately 90 000 to 100 000 tonnes of tires are produced in the country each year, but since they are not classified as hazardous waste, buyers or users are not motivated to recycle. This situation will change as Czech legislation is harmonized to EU standards.

Table 5. Total Municipal Waste-management Services Market: Percentage of Waste by Treatment and Disposal Option in the Czech Republic, 1999

Channel	Percentage	Trend
Biological	–	
Recycling	0.8	Up
Thermal	14.2	Stable
Landfill	85	Up
Others	–	
Total	100	

Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungary, Slovakia and Slovenia*, August, 1999.

Although the need for waste-processing plants is pressing, the "not-in-my-backyard" (NIMBY) syndrome has caused problems, especially in the development and construction of new incinerators. In 1998, an incinerator was built in Prague, causing considerable controversy among environmentalists and community activists. Public concerns centred around the lack of environmental impact studies undertaken prior to construction.

The state environment fund, a source of funding set up in 1991 by the Ministry of the Environment, is a primary source of financing for environmental projects. The fund garners these project monies through the collection of a "green" tax on companies that are in breach of air, water or waste regulations.

In the Czech Republic, private and municipal environmental investments are on the increase. In 1992, only 27% of total environmental investment came from private and municipal funding; by 1996, that rate had risen to 84%. However, central state funds invested in the environment have decreased — from 44% in 1992, to 14% in 1996 — and it is expected that this situation will remain unchanged in the foreseeable future. Western European investment in the environmental sector is expected to rise in the near future, especially due to possible EU accession.

The best prospects for solid waste equipment are small incinerators with a capacity of 5 000 to 10 000 tonnes per year that also have the capability of burn hazardous wastes; hazardous waste collection; storage and transportation equipment; and equipment to upgrade incinerators, especially regarding the removal of dioxins and furans.

Best prospects for waste technologies are hazardous sludge and sludge treatment; biodegradation; chemical technologies; waste-minimization technologies for the petrochemical, chemical, pharmaceutical, automotive and machinery industries; on-site remediation technologies, including vapour extraction, chemical extraction, and electrokinetic remediation; and the use of biomass for energy generation.

Table 6. Solid and Hazardous Waste-management Equipment Market in the Czech Republic ($ millions)

	1998	1999	2000
Local Production	502	594.2	594.2
Imports	371.4	445.6	594.2
Exports	148.5	222.6	267.4
Total Market	742.9	817	921

Source: U.S. Department of Commerce, National Trade Data Bank. *Solid & Hazardous Waste Equipment*, March 1, 1998.

Best prospects for services include consulting services; remediation services for specific market niches; and risk assessment.

The main market drivers in the municipal waste-management services market are accession into the EU; the State Environment Policy; the Waste Management Act; green taxation; PHARE funding[3]; and increased private and municipal funding.

The main market restraints are the reliance on landfill; the decline in central state budget funds; the reduction in waste generation and consequent reduction in recycling market potential; and the NIMBY syndrome.

Hungary

Hungary is dealing with environmental problems associated with its former industrial infrastructure and centralized economic system. The central government, however, did not begin to focus its attention on environmental issues until 1996, when Hungary became a member of the OECD. Hungary's present commitment to join the EU has led to impressive progress in harmonizing its legislation with that of the European Union.

Expenditures on water pollution abatement currently account for 55% of the central government's environmental budget; waste management accounts for 15%; and air pollution control another 15%. The remaining 15% includes expenditures on training and public education.

Significant changes are expected to take place regarding the financing of environmental projects. The public sector currently finances between 60% and 70% of environmental expenditures, while the private sector contributes only 10% to 15%. Government financing is expected to drop to approximately 50%, while the private sector will contribute 30% to 40%. EU assistance and loans are expected make up 10% of funding.

In 1999, the National Inspectorate for Environmental Protection imposed $8.3 million in fines, over 40% of which were collected for violations regarding hazardous waste or sewage.

There is a demand for all types of environmental equipment and services in Hungary. High-quality pollution technologies from the West are well-received, and project financing is available from regional, bilateral and international sources.

[3]PHARE is a European Community programme that supports the process of transformation that the economies of Poland, Hungary, Bulgaria, Czech Republic, Slovakia, Rumania and the ex-Yugoslavia are undergoing.

EU Accession

Hungary embraced an aggressive program for environmental protection in 1998, which included an investment program for 1998-2002. Hungary's target for full alignment with the *acquis* is 2001. An inter-ministerial committee on sustainable development has been established for the integration of environmental concerns into various ministries. This committee includes representatives from the ministries of Environment, Agriculture and Transport. In reality, however, very little progress toward the accession partnership was achieved in 1998. The Ministry of Environment has estimated that $15 billion in environmental investment is required to comply with EU regulations, including approximately $6 billion to implement the six-year National Environmental Action Plan (NEAP), which was passed in 1997. The NEAP will increase annual spending on the environment to close to 2% of Hungary's GDP, up from its current level of 1.2% to 1.3%, bringing it in line with other European countries.

Recent progress toward accession has been made in the area of industrial pollution and control of major accidents. However, considerable effort is necessary in virtually all other areas, most notably in waste management, and water and air quality. The EU has singled out the environment as an area that needs to be upgraded in order to conform to the *acquis*. It is unlikely that Hungary will achieve its own target of 2001 unless it takes measures to speed up both legal alignment and investment in environmental technology and infrastructure. However, some important steps are being taken through the NPAA, and a comprehensive plan will follow.

Other issues related to EU accession in the environmental arena include:

- In the water sector, no progress has been made in legislation. In spite of this, some important gains were made in urban wastewater treatment (e.g. technology upgrades, increased capacity, and additional sewerage systems and mechanical treatment facilities).

- Regarding industrial pollution control and risk management, pollution from industrial and large combustion plants has been reduced over the past 20 years and is now close to conforming with measures set out in the *acquis*. However, for approximately 1000 existing plants, alignment in the area of integrated pollution and prevention control will require substantial financial investment.

- Hungary passed a law on catastrophes in 1999, which aligns it with the *acquis* on the control of major accident hazards.

- No progress has been made in air quality control.

- No progress has been made regarding waste-management policy despite the high priority placed on it in the NEAP. Waste is seen as the weakest sector in

Hungary with respect to environmental management and adoption of waste-management legislation is a priority. Ten regional landfills were constructed in 1998, but it is unknown whether they will comply with the yet-unwritten legislation.

Water and Wastewater Treatment

Hungary has, per capita, the highest amount of water flowing through it in the world. Water distribution has increased over the past half decade from a volume of 650 million square metres in 1994 to 4.7 billion square metres in 1999. In that time, the number of water distribution companies increased from just over 50 to over 260.

Hungarian water quality suffers the effects of sewerage and industrial emissions and agricultural run-off. It is estimated that 71% of this pollution comes from the municipal sector, 24% from the manufacturing industry, and 1.7% from the mining industry. However, while almost 90% of wastewater from the manufacturing industry is treated, only 60% of municipal wastewater and 15% of mining wastewater is treated.

Table 7. Total Water- and Wastewater-treatment Equipment: Market Engineering Measures for Hungary, 1999

Measurement Name	Measurement	Trend
Market size (1999)	$1,248 million	I
Annual market growth rate (1999)	6.8%	S
Compound annual growth rate (1999-2006)	5.4%	
Price range for water-treatment equipment	$15,000 to $300,000	S
Price range for wastewater-treatment equipment	$15,000 to $1.5 million	S
Population connected to main water supply	98%	S
Population connected to main sewage system	53%	I
Population connected to biological treatment system	19%	I
Replacement rate (average period of unit replacement)	10-15 years	S
Market concentration*	15%	I
Number of competitors (1999)	30-40	S
Number of existing water-treatment plants	700	S
Number of existing wastewater-treatment plants	1000	I
Market forecast (value in 2006)	$1.21 billion	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1999 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *European Central and Eastern European Water and Wastewater Treatment*, April 17, 2000.

Although groundwater pollution is widespread throughout the country, the situation is most grave in areas close to industrial centres such as the Sajo River Valley and along the Tisza and Danube rivers.

There are five regional water boards in Hungary, although management of water services — including responsibility for financial investments — lies in the hands of individual municipalities.

In 1998, investments into water treatment and sewage collection and treatment reached $375 million. It is estimated that sewage treatment alone would demand approximately half of the total estimated environmental investment needed to comply with EU regulations.

Little research and development regarding water and wastewater treatment takes place in Hungary and end users do not tend to replace their existing products just because state-of-the-art technologies are available.

There has been relative success in improving the availability of water-treatment facilities in Hungary. Most of the larger cities have recently put large-scale treatment facilities in place and the market has stabilized, except in the area of small-scale upgrading projects.

Local companies make up about 37% of the market share for water and wastewater treatment equipment, while Western European firms accounted for 45% of the market. The combined Canadian-U.S. market share was 10%.

The main market drivers in the Hungarian market for water and wastewater treatment include:

- Hungary is in the first tier of countries hoping to join the European Union, and must harmonize its environmental legislation with EU norms.
- The central government has placed a priority on developing the water and wastewater sector.
- Hungary is increasing its participation in R&D programs and has access to the $23.5 billion in resources available to participants in the Fifth Framework Program for Research and Development of the European Union. (Currently, Hungary's contribution to the program is negligible, but it will be gradually increased until it reaches 2% of GDP in 2002.)

Project financing continues to be the major market restraint. This problem continues even though EU funding is available, because the government must provide internal financing as well. In the water and wastewater sector, projects commonly receive about

40% of funding from external investors, for example, the EU (through pre-accession funds such as PHARE, ISPA, SAPARD), the European Investment Bank, the World Bank; 31% from the central government; and 29% from the municipality involved. This proportion varies on project-by-project basis and funding from external sources can reach 90%.

Solid-waste Treatment

Hungary adopted its new Waste Management Act in 1998 with the specific goal of conforming to EU norms. New legislation for waste removal was approved in May 2000 and will come into force in January 2001. The new legislation will cover waste management and facilities and mining of waste materials, but does not deal with air pollution.

Hungary currently has environmental acts to cover product fees or green taxes on fuels, tires, refrigerants, car batteries, packaging materials; industrial and municipal waste management; hazardous wastes; and environmental load charges levied on companies based on their levels of emissions — rather than imposing fines. The establishment of taxes on other goods is being studied, for instance, a tax on discarded electronic products, including computers.

Table 8. Total Municipal Waste-management Services Market: Market Engineering Measures in Hungary, 1999

Measurement Name	Measurement	Trend
Market size	$230 million	I
Market size (tonnes)	4.3 million	I
Annual market growth rate (1998)	6.2%	I
Compound annual growth rate (1998-2005)	8.2%	
Average collection price	$27 per tonne	I
Average biological price	$12 per tonne	I
Average thermal price	n/a	
Average landfill price	$24 per tonne	I
Market concentration*	10%	I
Number of competitors (1998)	1500	D
Degree of privatization	22%	I
Number of treatment sites	2600	D
Population served by regular municipal collection (%)	82%	I
Market forecast (value in 2006)	$400 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1998 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Table 9. Total Municipal Waste-management Services Market: Revenue Forecasts for Hungary, 1995-2005

Year	Revenue ($ million)	Revenue Growth (%)	Year	Revenue ($ million)	Revenue Growth (%)
1995	198	—	**2000**	264	7.6
1996	205	4.3	**2001**	287	8.4
1997	217	5.3	**2002**	312	8.8
1998	230	6.2	**2003**	339	8.9
1999	245	6.9	**2004**	368	8.6
			2005	400	8.3

Note: All figures are rounded.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungary, Slovakia and Slovenia*, August, 1999.

Although municipal solid-waste collection increased from 60% of homes in 1988 to 80% in 1997, extending waste collection to rural areas and finding landfill space remain

problems. Although virtually all of Budapest's waste is collected, the percentage of waste collection is much lower in rural areas . The preferred method of waste disposal is still the landfill, due, in large part, to higher costs associated with treatment and recycling and waste. Of the 2700 municipal waste-disposal sites in Hungary, over two thirds of them are in need of modernization to avoid being closed. It is expected that most of these sites will be closed and a smaller number of regional sites developed. This situation is expected to lead to a shortage of suitable landfill sites in the near future, and the search is underway for more efficient ways to increase landfill capacity.

Table 10. Total Municipal Waste-management Services Market: Percentage of Waste by Treatment and Disposal Option in Hungary, 1999

Channel	Percentage	Trend
Biological	3	Stable
Recycling	3.2	Up
Thermal	7.2	Down
Landfill	86.6	Stable
Others	–	
Total	100	

Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Incineration is used to dispose of only 10% of municipal waste. There are two municipal incinerators in Hungary — in Budapest and Gyor. The Budapest incinerator has a capacity of over 300 000 tonnes per year and is used to dispose of much of the city's waste.

A total of 15% to 17% of municipal waste is currently being recycled. Although this number is low, there is public interest in recycling and the market is expected in grow in the short and long terms. Nearly 90% of ferrous waste and 30% of paper waste are recycled in the industrial sector.

Major economic changes have resulted in a decrease in the amount of industrial waste generated. Large outdated manufacturing plants have been upgraded and replaced using new, more efficient technologies, but further reductions in the production of industrial waste arel necessary.

Approximately 5 million tonnes of hazardous waste was generated in Hungary in 1998. Much of this waste is the result of the shutdown of production plants with outdated technologies and approximately 15% was red mud — the result of aluminium processing. There are many hazardous waste deposits around the country — the

legacy of decades of communist industrialization. These deposits are estimated at 70 to 100 million tonnes and cause continuing damage to the environment.

There is one major hazardous waste incinerator in Hungary, with a capacity of 25 000 tonnes a year, and approximately 100 smaller private incinerators throughout the country. There is one modern hazardous landfill that processes 10 000 tonnes per year for final disposal. This landfill, with a capacity of 300 000 tonnes, is expected to be in use for another 20 years.

Medical waste incineration is a national priority. Of the 44 existing medical waste incinerators, only 15 meet emission standards. At present, most medical waste incinerators are owned and operated by the hospitals, although it is increasingly becoming the practice for hospitals to contract to private hazardous waste incinerators.

There is a growing demand for site remediation but costs are often prohibitive. Demand is also on the increase for pollution-prevention and waste-minimization equipment for industrial and hazardous waste, and technologies for recycling industrial waste. There is also a need for companies with project-management skills.

Vivendi/Sarp Industries (France) operate the only major modern hazardous waste incinerator in the country. The Austrian company Pyrus-Rumpold Rt owns the only modern landfill for the final disposal of hazardous waste. Some companies (e.g. chemical, pharmaceutical and cement) and hospitals incinerate their own waste and some will incinerate waste for other companies.

While expenditures on waste management currently account for only 15% of Hungary's total environmental budget, during the next six years they are expected to rise to 20% to 25%.

Waste-management challenges deal with inefficient and illegal use of landfills causing contamination of soil and groundwater, in part due to unenforced regulations and increasing disposal costs. The lack of information and monitoring systems has resulted in a fragmented waste market in Hungary, where illegal dumping continues to be a major problem. In the waste industry, there is a high demand for site monitoring as well as for technologies for sample analysis and waste characterization as well as site monitoring.

The main industrial waste sources are the mining, energy, metal working, agriculture, food, wood and construction industries. The pulp and paper industry now obtains about 80% of its production material from waste paper. This percentage is among the highest rates in Europe, and is driving the recycling industry in Hungary.

The private sector now holds 22% of the total market for waste management in Hungary. This share varies from over 50% in larger urban areas, to close to nil in

smaller towns of less 70 000, where the public sector continues to provide waste services.

Table 11. Market for Waste-management Equipment and Services in Hungary ($ millions)

	1998	1999	Growth projected for 2000-2002 (%)
Local Production	29.7	32.7	
Imports	96.6	105.5	8 - 10
Exports	7.4	8.9	
Total Market	118.9	129.3	8 - 10

Source: U.S. Department of Commerce, National Trade Data Bank. *Waste Management – Hungary*, March 1, 1999.

Market drivers for the waste-management services are Hungary's impending accession to the EU; the new Waste Management Act; increased funding from the European Bank for Reconstruction and Development (EBRD); the preference for recycled paper products by the pulp and paper industry; and the implementation of taxes on packaging producers to finance recycling projects.

The market for waste-management services is restrained by: the high capital output necessary to meet requirements; the lack of landfill space; the lack of a market for recyclable materials; the delayed implementation of information and monitoring systems; and the use of outdated collection equipment.

Slovak Republic

The Slovak Republic became independent in 1993, when Czechoslovakia split into two countries. Since this time, the Slovak Republic has continued on the road to a free-market economy. However, state control of economic development is much greater than that of the Czech Republic, and this situation has complicated the economic reforms. Although attempts to improve environmental conditions have been somewhat successful, environmental issues have been put on the back burner due to the current economic situation. Balance-of-payment difficulties led to a currency devaluation last fall, and unemployment in some areas is approaching 30%. Inflation increased to 10% in 1999, and trade deficits are growing as Slovak imports are increasing and their exports are declining. These factors have led to fears of an unstable market, and foreign investors are reluctant to enter the Slovak market.

The Slovak Republic, like the Czech Republic, is suffering from environmental problems associated with its communist past. However, a Slovak environmental policy has been set established, in The Strategy, Principles and Priorities of Government Environmental

Policy (1993) and the NEAP. The Ministry of Environment also set up the Slovak Environmental Inspectorate to approve permits, recommend projects to the State Environment Fund, and enforce environmental regulations. A number of differential tax rates, fees and penalties have been set up by the Inspectorate to act as a deterrent to polluters. Enforcement measures have, however, been minimal, as many transgressors are either state-owned heavy industries or private companies whose owners can rarely afford to pay the penalties.

The slow progress of privatization has had environmental consequences. Specifically, once a factory is singled out for privatization, the Slovak government ends any investment in environmental improvements for the factory, and often ignores its own environmental responsibilities.

EU Accession

The Slovak Republic is in the most dire position regarding complying with EU's demands. The Slovak Environment Ministry announced on June 13, 2000, that it would need more financing to be able to be ready for accession by January 1, 2004. About 300 European directives concerning the environment need to be adopted by this time. According to the Environment Ministry, the building of the necessary environmental infrastructure will require over $4 billion; it is unknown who would supply the required financing.

The Slovak government prepared an ambitious legislative program to speed up alignment with the *acquis*, but has been criticized for the delay in the passage of a new waste law and an amendment to the law on the protection of atmosphere against pollution. The government has yet to implement the principle of integration of environmental aspects in all policy areas, and financial plans have not been established to ensure implementation of the *acquis*. Efforts are especially needed to transpose the framework legislation in the areas of water, air, waste and radiation protection and to strengthen institutions to properly and efficiently implement the legislation. Some of the specific issues in the Slovak environmental arena include:

- Regarding the water sector, no progress has been made and all legislation needs to be implemented.

- The waste-management framework legislation has been harmonized to a degree. Waste prevention, recycling and the reduction of landfills have begun to be implemented, but there is no specific legislation on landfilling of waste. Further, no legislation on waste streams, such as batteries or packaging, is yet in place.

- Considerable progress has been made in the air-quality sector. Two laws entered into force in early 1999 to adopt EC legislation on reducing certain

emissions. An act on fees for polluting the environment has also been put into place. In 1999, the Slovak Republic also ratified the latest amendment to the *Montreal Protocol* and a decree implementing the Act for the Protection of the Ozone Layer has been adopted.

- There has been no progress in the fields of noise, industrial pollution control and risk management.

Water and Wastewater Treatment

Water and wastewater issues in the Slovak Republic are much the same as those in the Czech Republic and other CEECs. The water quality is poor with heavy industry being responsible for most of the pollution — industrial groups continue to dump untreated wastewater into rivers. Municipalities, too, often dispose of untreated or under-treated wastewater into rivers because of the lack of sewage-treatment plants in the country. The National Environmental Policy has put access to an adequate potable water supply and reduction of water pollution on its list of priorities. It has established a target of a 50% reduction in pollutants in water by 2010 and a 60% increase in the volume of wastewater that is treated.

The Slovak Republic lacks the capacity to treat all of the wastewater produced, but approximately 95% receives at least partial treatment. In order to achieve this, existing plants are working above capacity, which often results in the release of untreated wastewater that does not meet environmental standards.

Table 12. Total Water- and Wastewater-treatment Equipment: Market Engineering Measures for the Slovak Republic, 1999

Measurement Name	Measurement	Trend
Market size (1999)	$467 million	I
Annual market growth rate (1999)	4.3%	I
Compound annual growth rate (1999-2006)	5.7%	
Price range for water-treatment equipment	$7,500 to $300,000	S
Price range for wastewater-treatment equipment	$7,500 to $1.2 million	S
Population connected to main water supply	83.3%	I
Population connected to main sewage system	55.3%	I
Population connected to biological treatment system	48.7%	I
Replacement rate (average period of unit replacement)	10-15 years	S
Market concentration*	20%	I
Number of competitors (1999)	36813	I
Number of existing water-treatment plants	2187	I

Measurement Name	Measurement	Trend
Number of existing wastewater-treatment plants	375	I
Market forecast (value in 2006)	$688 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1999 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *European Central and Eastern European Water and Wastewater Treatment*, April 17, 2000.

Key end users of water-treatment equipment are municipalities (which accounted 72% of total revenues spent on water treatment in 1999) and industry (28%). The numbers are much the same for wastewater-treatment equipment, with municipalities accounting for 77% of revenues and industry 23%. The municipal sector's share of revenues is expected to rise as municipalities attempt to conform to EU Drinking Water and Urban Wastewater directives. This trend coincides with a reduction in industrial production, and thus, a decline in demand for water-treatment equipment. The main end users of industrial water and wastewater equipment include the chemical and petrochemical industries, aluminium and steel industries, and cement and paper manufacturers.

Pricing is one of the main considerations in the financially stressed Slovak market. Due to a lack of financial resources in the country, prices — even on imports — are somewhat lower in the Slovak Republic than in the other CEECs. High competition has led to a decline in prices for older, established equipment and technologies, while prices for new technologies are beginning to stabilize.

The main market drivers for water- and wastewater-treatment equipment in the Slovak Republic are the transformation of the economy; attempts to conform to legislative norms set out under the *acquis*; and the use of enforcement measures such as taxes, fees and penalties to encourage the industry to be more environmentally responsible.

Main market restraints in this subsector are economic uncertainty; non-enforcement of legislation; the decline in industrial production; declining investments in the environment; and the fact that neighbouring countries, in particular the Czech Republic, have been more attractive to foreign investment than the Slovak Republic.

Solid-waste Treatment

The Slovak Republic's Ministry of Environment drafted the Waste-management Program in 1993. The program sets out objectives for the years 1996, 2000 and 2005. Specific waste-management programs and their time frames have been drafted for various industries and for each geographic district. Objectives include constructing more waste incinerators; intensifying a program to compost biological waste; and increasing the recycling of reusable materials.

Growth in the waste-management market is expected to escalate. This year, revenue forecasts for municipal waste services are $76 million, an 8% increase over 1999. The market is forecast to reach $122 million in 2005, an increase of 16.6%. However, Canadian companies attempting to enter the market will be at a disadvantage to Western European companies that are already established in the market.

Table 13. Total Municipal Waste-management Services Market: Market Engineering Measures for the Slovak Republic, 1999

Measurement Name	Measurement	Trend
Market size	$68 million	D
Market size (tonnes)	1.78 million	I
Annual market growth rate (1998)	0.1%	I
Compound annual growth rate (1998-2005)	8.6%	
Average collection price	$15 per tonne	I
Average biological price	$38 per tonne	S
Average thermal price	$45 per tonne	I
Average landfill price	$36 per tonne	S
Market concentration*	17.8%	I
Number of competitors (1998)	560	D
Degree of privatization	20%	I
Number of treatment sites	544	D
Population served by regular municipal collection	60%	I
Market forecast (value in 2006)	$122 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1998 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Table 14. Total Municipal Waste-management Services Market: Revenue Forecasts for the Slovak Republic, 1995-2005

Year	Revenue ($ million)	Revenue Growth (%)	Year	Revenue ($ million)	Revenue Growth (%)
1995	65	—	2000	76	8
1996	67	1.7	2001	80	5.7
1997	190	5.8	2002	86	7.2
1998	68	3.3	2003	94	8.8
1999	70	-0.1	2004	105	12
			2005	122	16.6

Note: All figures are rounded.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

The number of landfill sites is declining as the rate of closure accelerates for sites that do not meet environmental standards. Currently, almost 70% of municipal waste is disposed of in landfills without any prior treatment. As the Slovak population increases, however, so does the amount of waste generated. Alternatives to landfilling must be found if the Slovak Republic is to meet conditions set out in the *acquis*. The Slovak Republic has two existing waste incinerators and is planning to open another (the time frame for this project is not known). The average price for waste collection is $15 per tonne; incineration costs are about $45 per tonne. Landfill prices are expected to rise in order to finance the upgrading of sites and to encourage alternative means to dispose of waste. The main technology used in solid-waste treatment is super pressing; in the case of liquid waste, cementation and incineration are common.

Although the Slovak Republic does not have the capacity to manage its own waste, it imports a considerable amount from other countries for financial gain. More investment in waste management is necessary to enable the Slovak Republic to more effectively deal with waste. The Slovak Nuclear Supervisory Bureau approved the trial operation of a national storage facility for low- and medium-level radioactive waste in November 1999. The plant will hold waste produced at the country's two nuclear power plants as well as waste from Slovak research institutes, laboratories and hospitals.

In Slovakia, less than 2% of waste is recycled. However, cities and municipalities are now required to put waste-separation programs into operation. This has contributed to an increase in recycling activities. Recycling efforts are slowly increasing in the Slovak Republic and waste is gradually being diverted from landfills — 19% less waste was sent to landfills in 1997 than the previous year. For example, in 1997, 187 100 tonnes of wastepaper were reused: wastepaper from local sources accounted for 115 600 tonnes, while 71 500 tonnes were imported.

Table 15. Total Municipal Waste-management Services Market: Percentage of Waste by Treatment and Disposal Option in the Slovak Republic, 1999

Channel	Percentage	Trend
Biological	3.5	Up
Recycling	2	Up
Thermal	8.5	Up
Landfill	68.9	Down
Others	17.1	Stable
Total	100	

Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Market drivers for the municipal waste-management services market in the Slovak Republic are EU accession; the institution of the Waste Management Program; the availability of funds from the EBRD; and the rise in population and concurrent increase in waste generation.

Market restraints include the reduction in financing from the Slovak State Environmental Fund; the reliance on landfill sites; and the lack of a waste infrastructure.

Slovenia

Despite serious economic problems in the 1980s due to the disintegration of Yugoslavia, Slovenia is the most prosperous and one of the most successful CEECs in terms of its economic, industrial and environmental restructuring programs. The Slovenian government has an impressive and relatively long record of environmental protection dating back to the 1970s, when a body responsible for environmental issues was created.

By 1991, when Slovenia gained independence, environmental concerns had changed, due in part to acceleration in the restructuring of the economy. A new Environmental Protection Act was passed in 1993 to address these changes and provide concrete measures to protect the environment, including the PPP. This allowed for implementation of a series of preferential tax rates and a series of penalties for violators of the Act.

Since independence, much of heavy industry has been privatized. Owners of private industry are anxious to comply with international norms in order to be able to compete in the international arena. Further, financial returns on initial investments in environmental protection have encouraged additional spending in that area.

Slovenia's strong transportation infrastructure has been a drawing feature for foreign companies. The country is linked to the rest of Europe by air, land and sea. Slovenia has an extensive railway system and sophisticated cargo facilities are available at the port of Koper on the Adriatic Sea. A modern highway system is expected to be completed in 2004.

The Slovene economy is geared toward services and manufacturing — industry accounts for 32% of the country's output. There are currently some concerns about Slovenia's ability to maintain its economic stability. Structural reform efforts have stagnated and economic growth is thought to be contingent on sound economic management. Environmental concerns have therefore moved down the central government's list of priorities.

EU Accession

Slovenia's success in the adoption of environmental measures as outlined in the *acquis* varies from sector to sector. Compliance in the areas of water and waste management is relatively high, while in areas including industrial risk management and chemicals, efforts will have to be hastened to ensure Slovenia meets its own time line.

Slovenia has already made some major gains in adopting framework legislation. In 1998 alone, 13 water-protection acts, three air protection acts, and two waste management acts were ratified. However, administrative and financial instruments for the implementation of the *acquis* have yet to be developed. The National Environmental Action Program, adopted in September 1999, defines the strategies and goals for environmental protection and the use of natural resources over the next 10 years. Specific issues in the environmental arena include the following:

- Regarding the water-protection sector, framework legislation has not been adopted, although various acts covering emissions in the discharge of wastewater from certain industries (e.g. agri-food, chemical) have been instituted.

- In the area of water management, amendments to laws regarding the import, export and transportation of waste have been adopted and some rules on waste and waste-oil management have been passed.

- Amendments to laws on emissions from heating plants have been passed.

- Slovenia has instituted legislation on volatile organic compounds and passed a number of laws on the quality and safe handling of fuels.

- The Law on Chemicals was passed in 1999 but the legislation has yet to be implemented.

- Slovenia has requested a transitional period until December 31, 2004 in the field of fuel quality, and the production of fuels with higher sulphur, lead and benzene content. Transitional periods have also been requested in the fields of waste management (five years), urban wastewater (10 years) and integrated pollution prevention and control (four years).

Water and Wastewater Treatment

Water protection was one of the first environmental problems addressed by Slovenia. The Water Protection Act was enacted in 1975, but has since been subject to various amendments. The EU Urban Wastewater and Drinking Water directives are expected to be the legislative force in driving the water- and wastewater-treatment equipment market in Slovenia.

The market for water- and wastewater-treatment equipment in Slovenia is relatively small but growing. Pricing is one of the most important considerations for companies attempting to establish a presence in the market. Market prices are among the lowest in the CEECs due, in great part, to the lack of funding available to customers.

The privatization of the utility sector is under way and it is anticipated that environmental standards in water and wastewater management will increase. An increase in standards is expected to lead to increased demand for equipment compatible with existing systems. A lot of activity is also expected in upgrading existing equipment. Slovenian companies are not strong in the area of water and wastewater technologies, and rely on foreign companies for more advanced equipment. The market is not technology driven.

Table 16. Total Water- and Wastewater-treatment Equipment: Market Engineering Measures for Slovenia, 1999

Measurement Name	Measurement	Trend
Market size (1999)	$163 million	I
Annual market growth rate (1999)	4.0%	I
Compound annual growth rate (1999-2006)	5.7%	
Price range for water-treatment equipment	$7,500 to $300,000	S
Price range – wastewater-treatment equipment	$7,500 to $1.2 million	S
Population connected to main water supply	88%	I
Population connected to main sewage system	44%	I
Population connected to biological treatment system	20-30%	I
Replacement rate (average period of unit replacement)	10-15 years	S
Market concentration*	25%	D
Number of competitors (1999)	36813	I
Number of existing water-treatment plants	300	I
Number of existing wastewater-treatment plants	60	I
Market forecast (value in 2006)	$240 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1999 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *European Central and Eastern European Water and Wastewater Treatment*, April 17, 2000.

The water-treatment equipment market is growing at rates ranging from 3.4% in 1997 to an expected 5.6% in 2003. The connection rate to the main water supply system is relatively low and leakage is a major problem. Leakage rates often reach 40%, and in 1997, reached 43.6%.

Wastewater treatment is a significant area of concern in Slovenia. Large amounts of untreated municipal and industrial wastewater continue to be discharged into lakes and rivers. Pollution from wastewater has been reduced in the last five years, due largely to a drop in industrial pollution. Existing facilities for wastewater management do not have the capacity to deal with the country's municipal wastewater, and only 44% of the population is currently connected to the main wastewater system.

Municipalities and communities make up 65% of the water-treatment equipment market and 70% of the wastewater-treatment equipment market. Industry is responsible for the remainder of the market. The public sector also dominates the market for municipal solid-waste equipment, and currently only 10% of the market is owned by private companies.

Major market drivers for water- and wastewater-treatment equipment in Slovenia are domestic legislative developments; the establishment of trade links with Central and Eastern Europe and the European Union; the country's strategic geographic location; the existence of a sound infrastructure; and the introduction of a system of tax incentives and penalties.

Major market restraints include complications due to economic reforms; the lack of available funds; and low enforcement of environmental legislation.

Solid-waste Treatment

The Slovene solid-waste treatment market is small; only 900 000 tonnes of waste are generated each year. However, the Slovene government is very serious about improving its waste-management infrastructure. Rules on Waste Disposal, adopted in early 2000, outline compulsory treatment and other conditions for waste disposal as well as the conditions and measures with regard to the planning, construction, functioning and closure of landfills.

The Regulation on Waste Management was issued in December 1998, outlining conditions for the collection, transport, treatment and recovery of waste. It places waste into different categories, and lists various types of hazardous waste and their compulsory treatment.

The Slovene NEAP outlines the objectives and strategies to be followed for environmental protection and the use of natural resources from 1993 to 2003. The program provides funding to implement improvements in the waste-management infrastructure. The program is expected to provide $1.3 million for water protection and waste management.

Slovenia adopted a Waste Management Strategy in 1996. The study looks at strategies to conform to EU norms on solid waste and is expected to strengthen the framework set out for waste management.

Environmental programs are generally funded by the central government and by a system of fines and permits for environmental activities. Government investment in environmental programs has been on the decline however, and it is well below the EU average. Government investment has dropped to a point where it is insufficient to cover requirements set by the government itself.

Table 17. Total Municipal Waste-management Services Market: Market Engineering Measures for Slovenia, 1999

Measurement Name	Measurement	Trend
Market size	$30 million	I
Market size (tonnes)	0.9 million	I
Annual market growth rate (1998)	2.7%	I
Compound annual growth rate (1998-2005)	15.9%	
Average collection price	n/a	
Average biological price (per tonne)	n/a	
Average thermal price (per tonne)	n/a	
Average landfill price (per tonne)	n/a	
Market concentration*	10%	I
Number of competitors (1998)	300-450	D
Degree of privatization	10%	I
Number of treatment sites	64	S
Population served by regular municipal collection (%)	75%	I
Market forecast (value in 2006)	$82 million	I

Trend: I – increasing; D – decreasing; S – stabilizing.
* % of 1998 market controlled by top three competitors.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Table 18. Total Municipal Waste-management Services Market: Revenue Forecasts for Slovenia, 1995-2005

Year	Revenue * ($ million)	Revenue Growth (%)	Year	Revenue ($ million)	Revenue Growth (%)
1995	28	—	2000	33	8.2
1996	28	1.3	2001	37	12.1
1997	28	1.7	2002	43	16.3
1998	30	2.7	2003	55	21.6
1999	31	5.2	2004	65	24.8
			2005	82	24.7

* All figures are rounded.
Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

Slovenia is attempting to reduce its reliance on landfills and is placing more emphasis on the recovery and treatment of solid waste. Existing landfills are expected to reach

capacity by 2005, and the government plans to reduce the impact of this situation by building 44 composting plants and two waste incinerators. More landfills will have to be developed, but there is little public interest in situating them close to communities. The NIMBY syndrome has been the major problem in the development of regional treatment facilities.

As the Slovene standard of living increases, volumes of waste are also on the rise. As the economic system becomes increasingly Westernized, there are increases in end-of-life vehicles, electronic products and food packaging. Slovenia is in the process of putting together legislation on packaging and packaging-related waste. The legislation, which should be in place this year, will focus on the development of regional treatment centres for recycling. Demand for recycling and separation equipment will continue to rise.

Table 19. Total Municipal Waste-management Services Market: Percentage of Waste by Treatment and Disposal Option in Slovenia, 1999

Channel	Percentage	Trend
Biological	8	Up
Recycling	2	Up
Thermal	–	
Landfill	90	Stable
Others	–	
Total	100	

Source: Frost & Sullivan Inc. *Central and Eastern European Municipal Waste Management Services Markets – Poland, Czech Republic, Hungarian, Slovakia and Slovenia*, August, 1999.

The major market drivers for municipal waste-management equipment are an increase in waste generation; accession to the EU; the adoption of the Rules on Waste Disposal and the new Waste Management Strategy; and the Slovene NEAP.

The major market restraints are the NIMBY syndrome; lack of government funding; and the lack of recycling and composting facilities.

COMPETITIVE ENVIRONMENT

Local Capabilities and International Competition

Czech Republic: Local firms have saturated the Czech market demand for less-sophisticated equipment such as filter presses, tanks and pumps, but rely on foreign firms for new and alternative technologies.

Imports account for 15% to 20% of the total market for wastewater equipment. German companies dominate foreign penetration into the market and supply the Czech Republic with 29% of foreign imports. Other major foreign suppliers come from Austria, Denmark, Belgium, Sweden, Italy and France.

Hungary: Imports account for 75% to 80% of the total waste-management market. Major foreign suppliers and investors are German, Austrian and French environmental companies.

Slovak Republic: The Slovak Republic tends to steer away from foreign technologies and services due to a distrust of foreign companies has resulted, in part, from negative experiences in the past. Many foreign companies do not take the time to understand the specific market situation and apply solutions that do not correspond with Slovak needs. There is the perception that foreign companies fail to consult with the Slovaks on projects. Further, there has been evidence of some foreign companies promoting "dirty" industries in the Slovak Republic. In one case, it is alleged that pressure was put on the Slovak Republic to accept imports of hazardous waste in exchange for funds to build a waste incinerator.

Companies that know the market and are willing to prove that they are acting in the Slovak Republic's best interests are most likely to find success in this market. Western European (especially German, Austrian and French), U.S. and Canadian suppliers currently dominate the market.

Slovenia: Many local companies do not have the capability to provide a wide range of equipment and services for water and wastewater treatment. This constrains their efforts to compete with foreign companies, which dominate the market. Local companies hold only 32% of the total market. Slovenia depends on foreign companies for more sophisticated technologies.

Western European companies make up the majority of the water and wastewater market (52%). In the municipal waste-management sector, however, there is little foreign penetration, largely due to the small market size.

Canadian Position

Competitive Advantage through Canadian Government Policies and Initiatives

Program for Export Market Development

The Program for Export Market Development (PEMD) helps Canadian companies enter new markets by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. Eligible costs and activities include market visits, trade fairs, incoming buyers, product

testing for market certification, legal fees for international marketing agreements, transportation costs of offshore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute a market development plan. Activity costs are shared on a pre-approved, 50/50 basis.

The PEMD refundable contribution ranges from $5,000 to a maximum of $50,000. Preference is given to companies with fewer than 100 employees for a firm in the manufacturing sector and 50 in the service industry, or with annual sales between $250,000 and $10 million. Other components of the program include international bid preparation (Capital Project Bidding) and, for trade associations, developing international marketing activities for their membership. For additional information visit http://www.infoexport.gc.ca/pemd-e.asp or call 1-888-811-1119.

New Exporters to Overseas

The New Exporters to Overseas (NEXOS) program helps Canadian companies that have not yet exported to Europe. NEXOS introduces the essentials of exporting and provides practical information and first-hand exposure to European markets. Contact the Department of Foreign Affairs and International Trade, European Business Development Section (RENB) or visit http://www.infoexport.gc.ca/nexos-e.asp for more information about NEXOS.

Technology Early Action Measures

Technology Early Action Measures (TEAM), established as part of Canada's Climate Change Action Fund, offers additional support to federal programs that fund technology projects to reduce greenhouse gas (GHG) emissions nationally and internationally, while sustaining economic and social development. Eligible projects will demonstrate innovation in the transportation, energy, agriculture and various industrial sectors, and fall into three main areas:

- working with Canadian industry to reduce their GHG emissions;
- supporting community-based implementation of GHG emission-reduction technologies; and
- transferring Canadian GHG reduction technologies to other countries, particularly to developing nations.

To achieve the greatest results, TEAM will assign top priority to projects that demonstrate significant financial partnering with a number of interested parties, such as the private sector, provinces and municipalities. TEAM projects must be approved under existing federal government technology advancement programs.

Export Development Corporation

Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, bank credits or bank guarantees. Approval for financing is considered on a case-by-case basis.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) gives Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. The CCC will also act as a prime contractor on behalf of Canadian small and medium-sized enterprises, giving those businesses increased credibility and competitive advantage.

WIN Exports

WIN Exports, a database of Canadian exporters and their capabilities, is used by trade commissioners around the world and by Team Canada Inc partners in Canada to match Canadian suppliers with foreign business leads, and to share information on trade events. To register your company in WIN Exports or for more information, visit http://www.infoexport.gc.ca/winexports/menu-e.asp or call 1-888-811-1119.

Canadian Office for Technology Exchange in the Environment

The Canadian Office for Technology Exchange in the Environment (COTE) assists public organizations and companies from countries around the world in building bridges with their Canadian counterparts, with a view to developing their own technological capacity and to contributing to global sustainable development. COTE believes that the best way to ensure long-term environmental benefits to all countries is to bring public- and private-sector organizations together as partners working together toward common goals. COTE primarily focusses on technology exchange as way of activating domestic and international co-operation and business networks. To this end, it maintains a current inventory of Canadian technological capacity in areas such as potable water, wastewater, watershed management, solid and hazardous waste, soil decontamination, GHG reduction, energy efficiency, environmental assessments and geomatics. Using the inventory, COTE can match the needs and capabilities of foreign countries with Canadian capabilities, from both the public and private sectors, and to facilitate the development of mutually beneficial arrangements. COTE recognizes the priority given to environmental protection, sustainable development and climate change by a large

number of countries around the world. In this context, it aims at supporting the contribution that Canadian environmental organizations and firms wish to provide, either bilaterally or in co-operation with international institutions, to international environmental projects.

Canadian International Development Agency

Renaissance Eastern Europe Program

The Canadian International Development Agency (CIDA)'s Renaissance Eastern Europe Program (REE) Program helps Canadian firms to develop joint-venture investments in Eastern Europe. The program responds to the initiatives taken by Canadian firms that may wish to invest in Eastern Europe, either via joint ventures or wholly owned direct investment. REE supports venture-specific, front-end studies leading to the establishment of joint ventures, and enterprise-specific training for the personnel of the newly created joint venture.

Building Business Bridges

Building Business Bridges is a CIDA-funded program that assists Canadian companies that are interested in expanding their business to CEECs. The program facilitates the identification of companies interested in doing business with Canadian counterparts.

Partnerships for Tomorrow

The Partnerships for Tomorrow program was launched by CIDA in January 1999, to provide travel grants both to Canadians wishing to go to Central and Eastern Europe and to CEE nationals coming to Canada for the purpose of building linkages between Canadian and CEE partners. Private-sector companies, non-governmental organizations, professionals and academics are eligible to apply for travel grants (international airfare only) to participate in activities such as workshops, professional exchanges and study tours.

Technology Partnerships Canada

Industry Canada's Technology Partnerships Canada is an investment loan fund of $250 million that was created to assist in the development and eventual export of high-technology products. Investment loans must be fully repaid and are intended to help ensure that products with high potential actually reach the market. Sectors within bio-industries supported by the program include: therapeutics, including clinical trials in phases I and II; diagnostics, including clinical trials in phases I and II; agri-food; aquaculture; and bio-remediation. For further information, contact Technology Partnerships Canada at 1-800-266-7531 or consult the Internet at http://tpc.ic.gc.ca.

Environmental Technology Verification Program

To assure users of the effectiveness and reliability of Canadian technology, Environment Canada has established the Environmental Technology Verification (ETV) Program. This program compiles and makes available independent, credible performance data on specific Canadian technologies. Such a service can help foreign private and government environmental compliance staff to more readily install, or issue permits for, Canadian technologies.

Environment Canada's Environmental Technology Advancement Directorate and "Green Corps"

Administered by the Environmental Technology Advancement Directorate, the Green Corps comprises professionals who are available to assist Canadian companies with finding contracts and projects in international markets, and who can help companies to develop partnerships, bidding teams and proposals.

Environment Canada Compendium

Environment Canada published the *Compendium of Export and Financial Assistance Providers for the Canadian Environmental Industry* (April 1999) to help technology developers to identify sources of capital, export assistance, and export information. The Compendium focusses on private-sector organizations that provide capital or facilitate exports for environmental technologies.

PRIVATE-SECTOR CUSTOMERS

Information on private contracts most often comes from personal and professional contacts — there is no organization that collects and distributes information on business opportunities.

PUBLIC-SECTOR CUSTOMERS

Government Procurement Regulations

Czech Republic: In accordance with Czech law, public tenders must be issued for any procurement undertaken by a municipal or state organization, as well as when the source of financing is the municipal or state budget, state funds, or a grant or loan from an international organization. When procurement is to be financed by international funds, public tenders must be open for 180 days. For the purposes of responding to public tenders, joint ventures between Czech and foreign companies are considered to

be foreign initiatives and do not benefit from preferential treatment afforded to Czech companies participating in the bidding process.

Hungary: The Act on Public Procurement (1995) calls for open tenders for municipal and central government contracts exceeding $96,500 and for services over $47,500. Tenders are published in the weekly *Public Procurement Gazette*. Advance information on future projects may also be obtained from consulting and engineering companies. In theory, foreign and domestic companies enjoy equal access to contracts issued by public organizations; in practice, however, Hungarian companies are often treated preferentially. Some foreign suppliers prefer to have local representation respond to public tenders on their behalf.

Slovak Republic: Under the current system, domestic producers are favoured in public tendering processes. In situations involving partnerships between Slovak and foreign firms, the joint venture is considered a foreign initiative and is, therefore, not entitled to preferential treatment in the bidding process.

Slovenia: Since 1992, municipal and federal government contracts have been awarded through open competition in the form of public tenders. Slovenia's public tender practices conform with those in the European Union and with other international norms, and are governed by the Public Procurement Law of 1995. Notices are published on a weekly basis in the *Official Journal of the Republic of Slovenia*.

The European Procurement Information Network (EPIN) is a business development tool that provides companies with access to a database of contract notices. The EPIN database contains all contracts published in the *S-Supplement of the Official Journal of the European Communities*, that is, all the notices in Tenders Electronic Daily (TED). The EPIN site can be found at http://epin1.epin.ie/EPINN.htm.

Regional and International Financial Initiatives

World Bank

The World Bank is helping CEECs to meet the requirements for membership in the European Union. The Bank assists in efforts to accelerate privatization, reduce excessive tax burdens and promote social security reform. In less-advanced economies, the Bank helps with fundamental reforms to reverse negative economic growth trends, raise income levels and reduce poverty.

European Bank for Reconstruction and Development

The EBRD was established in 1991 to help the countries of Central and Eastern Europe and the former Soviet Union to develop market-oriented economies. It is a publicly owned and commercially oriented investment bank. The EBRD's mandate is to promote

economic transition, foster the private sector and protect the environment. Unlike other international financial institutions that operate principally in the public sector, only 25% of the EBRD's activities help finance the development of commercially oriented public infrastructure through sovereign loans. The remaining 75% of the EBRD's operations are focussed on financing private-sector projects.

European Investment Bank

The European Investment Bank (EIB) is the largest foreign financial source in Central and Eastern Europe with loans carrying conditions that tend to be more favourable than those available in the market.

The EIB has provided over $3 million in loans to the Czech Republic in order to prepare for EU accession. The loans were used to modernize telecommunications, promote infrastructure, upgrade water and sewage networks and for investment in the oil and gas sector. In June 2000, the EIB announced that it would be providing a further $160 million for 20 years to help finance a number of smaller water supply and wastewater projects across the country.

PHARE

PHARE is a program that has been responsible for allocating much of EU environmental funding in the last decade. The program was set up to help Central and Eastern European countries prepare for entry into the European Union. The PHARE program is focussed on pre-accession priorities related to the adoption of the *acquis*. During the period 2000-2006, PHARE support will focus on two main areas: institution building and investment.

Instrument for Structural Policies for Pre-Accession

The EU's Instrument for Structural Policies for pre-Accession (ISPA) is an important source of EU funds, which is expected to be in force from 2000 to 2006. ISPA's budget includes about $750 million for loans for investment in environmental protection, in particular the water- and wastewater-management sectors. To ensure transparency and easy implementation, the European Commission (EC) proposes to fund projects of sufficient size to have a significant impact rather than smaller programs. In many cases, ISPA combines EBRD and EIB funding. One example of this is funding put in place for a wastewater-treatment plant in Brno, the Czech Republic. Of the $85 million invested, $54 million is coming from EBRD, $12 million from PHARE, and additional support will come from ISPA funds.

Co-ordination Regulation

The EC has proposed a "co-ordination regulation" to ensure that the various forms of EU aid are managed coherently. It will define general conditions including co-financing, and regulations on accumulating aid from different agencies for the same project. A consultative committee will be set up to ensure overall coherency in financing by ISPA, other EU programs, the EIB, and international financial institutions.

MARKET LOGISTICS

Channels of Distribution

In the Czech Republic, Hungary, the Slovak Republic and Slovenia, appointment of a local distributor or agent is recommended. For foreign suppliers, in particular, finding a reliable local partner is essential in order to overcome cultural and linguistic barriers, ensure quality after-sales service, and tailor products and services to the needs and preferences of the local market. In most cases, distributors and agents based in major business centres in the CEECs are well-positioned to market products at both national and regional levels. In the Slovak market, in particular, enlisting the aid of a local agent is the preferred method of distributing products. In some cases agents may have jurisdiction to market products not only locally but regionally. In the Czech Republic, for example, local agents also often have established contacts in the Slovak Republic. Canadian companies can contact the Canadian Embassy in Hungary or the Canadian Embassy in the Czech Republic for assistance in finding a reliable agent or distributor.

Joint Ventures

Joint ventures and technology exchanges are recommended ways to gain access to the market. An agent or distributor who can keep in touch with key decision makers and who knows the local business practices can prove to be invaluable. A local presence in the market is also advantageous, especially regarding the provision of technical assistance and after-sales service.

Market-entry Considerations

Suggested Business Practices

Canadian exporters seeking entry into Central and Eastern European markets are urged to develop a thorough understanding of local business culture and consumer preferences, ideally through the establishment of close professional relationships with potential partners. Canadian companies should keep in mind, however, that they may face delays in project development and approval when engaging in joint ventures with local firms. Exporters should ensure that all matters relating to business arrangements

are fully agreed upon by all parties before engaging in any transactions. Canadian companies are also urged to enlist the services of a lawyer who is familiar with the market prior to signing any contract.

Canadian exporters should consider the purchasing preferences of Central and Eastern European customers — particularly price, quality and flexible terms of payment — when marketing their products and services in the region. An acceptable means of delivering quality after-sales service should also be discussed.

Import Regulations

Czech Republic: There is a nominal customs duty of 2% on environmental equipment imported from Canada. Equipment imported from EU and Central European Free Trade Agreement (CEFTA) members can enter the country duty-free. End users must also pay a 22% value-added tax (VAT) on all imports (regardless of origin). Some specific environmental products, including bio-gas, recycled paper products, water turbines, solar-energy equipment, small wastewater-treatment plants, air filters, and water- and heat-monitoring equipment, receive a preferential VAT rate of 5%.

Hungary: Hungary's trade environment is considered liberal. There are no restrictions or non-tariff barriers associated with environmental products in Hungary. Hungary is currently adopting international norms and working toward aligning its trade system with that of the European Union. All products are subject to a 25% VAT.

Export Credit Risks, Restrictions on Letters of Credit, Currency Controls

There are no foreign exchange controls or restrictions on Letters of Credit (L/C) precluding imports of foreign products into the Czech Republic, Hungary, the Slovak Republic or Slovenia. However, the availability of funds for payment of shipments can be an issue. Canadian suppliers are therefore advised to thoroughly discuss payment plans prior to exporting their products to CEECs.

While L/C are familiar to most companies in Central and Eastern Europe, they are often considered too costly to be a preferred payment option, particularly for smaller shipments. Rather, the most common payment methods are prepayment or partial prepayment with balance paid upon delivery or on a net 30-day term basis. However, importers are accustomed to flexible payment terms.

PROMOTIONAL EVENTS

Event	Organizer
Czech Republic	
ENVIBRNO International Environmental Fair October 2001 (annual) The largest and most significant exhibition of environmental products and technologies in Central and Eastern Europe.	BVV a.s. Brno, Czech Republic Tel.: (420-5) 4115-2880 Fax: (420-5) 4115-2992 E-mail: envibrno@bvv.cz
AQUA-THERM PRAHA International Fair of Environmental Technology and Heating November 23 - 25, 2000 (annual) Praha Holesovice Exhibition Grounds	Progress Partners Advertising Opletalova 55 11121 Prague 1, Czech Republic Tel.: (420-2) 2421-8403 Fax: (420-2) 2421-8312
Hungary	
INDUSTRIA 2000 International Industrial Exhibition May 22 - 26, 2001 Hunagexpo Fair Grounds, Budapest	Hungexpo Ltd. Albertirsai ut 10 H-1441 Budapest, Hungary Tel.: (36-1) 263-6369 Fax: (36-1) 263-6370 Internet: http://www.hungexpo.hu
KOMMUNALEXPO International Industrial Exhibition May 22 - 26, 2001 Hunagexpo Fair Grounds, Budapest	
CLEANEXPO International Industrial Exhibition May 22 - 26, 2001 Hunagexpo Fair Grounds, Budapest	

KEY CONTACTS AND SUPPORT SERVICES

Canadian Contacts

Canadian Embassy in the Czech Republic
(also has responsibility for the Slovak Republic)
Mickiewiczova 6
12533 Prague, Czech Republic
Tel.: (420-2) 7210-1800
Fax: (420-2) 7210-1894
Contact: Jitka Vrbova, Commercial Officer
E-mail: jitka.vrbova@dfait-maeci.gc.ca
Internet: http://www.dfait-maeci.gc.ca/prague

Canada Fund
Tel.: (420-2) 7210-1870
Fax: (420-2) 7210-1894
Contact: Martina Holíková, Co-ordinator
E-mail: martina.holikova@dfait-maeci.gc.ca

In the Slovak Republic
Office of the Canadian Embassy
Misikova 28D
81100 Bratislava, Slovak Republic
Tel.: (421-7) 5244-2175/8
Fax: (421-7) 5249-9995

Canadian Embassy in Hungary
(also has responsibility for Slovenia)
Street Address:
Zugligeti ut 51-53
1121 Budapest, Hungary
Mailing Address:
Budakeszi ut 32
1121 Budapest, Hungary
Tel.: (36-1) 392-3360
Fax: (36-1) 392-3395
Contact: Tamas Gyorffy
E-mail: tamas.gyorffy@dfait-maeci.gc.ca
Internet: http://www.dfait-maeci.gc.ca/budapest

Department of Foreign Affairs and International Trade (DFAIT)
125 Sussex Dr.
Ottawa, ON K1A 0G2

Baltic, Central European and EFTA Countries Division (REC)
Tel.: (613) 992-1449
Fax: (613) 995-8756
Contact: Pierre Boucley
E-mail: pierre.boucley@dfait-maeci.gc.ca

European Business Development Section (RENB)
Tel.: (613) 995-6565
Fax: (613) 996-3298
Contact: Emmanuel Skoulas
E-mail: emmanuel.skoulas@dfait-maeci.gc.ca

Market Support Division (TCM)
Tel.: (613) 996-1758
Fax: (613) 944-0050
Contact: Sherrill Owen
E-mail: sherrill.owen@dfait-maeci.gc.ca

Industry Canada
235 Queen St.
Ottawa, ON K1A 0H5

Environmental Affairs Branch
Tel.: (613) 954-3080
Fax: (613) 954-9564
Trade Team Canada (Environment):
ttc.environment@ic.gc.ca

Canadian Office for Technology Exchange in the Environment (COTE)
Tel.: (613) 954-3434
Fax: (613) 954-3430
Contact: Heather Schoemaker, Project Manager
E-mail: schoemaker.heather@ic.gc.ca

Canadian International Development Agency
Americas Branch
200 Promenade du Portage
Hull, QC K1A 0G2
Tel.: (819) 997-2277
Fax: (819) 994-0251
E-mail: info@acdi-cida.gc.ca

Export Development Corporation
151 O'Connor St.
Ottawa, ON K1A 1K3
Tel.: 1-800-880-1884 or (613) 598-2500
Fax: (613) 327-2690
E-mail: export@edc4.edc.ca
Internet: http://www.edc.ca

Canadian Commercial Corporation
50 O'Connor St., Suite 1100
Ottawa, ON K1A 0S6
Tel.: (613) 996-0034
Fax: (613) 995-2121
Internet: http://www.ccc.ca

Environment Canada
Environmental Technology
Advancement Directorate
351 St. Joseph Blvd, 18th Floor
Hull, QC K1A 0H3
Tel.: (819) 953-3090
Fax: (819) 953-9029

Environment Canada Green Corps Office
Tel.: (819) 994-7319
Fax: (819) 994-2541
Contact: Kathleen Fischer, Director
E-mail: Kathleen.fischer@ec.gc.ca

ETV Canada Inc.
P.O. Box 85059
867 Lakeshore Rd.
Burlington, ON L7R 2G0
Tel.: (905) 336-4546
Fax: (905) 336-4519
E-mail: info@etvcanada.com

Canadian Industry Associations and Chambers of Commerce

Alliance of Manufacturers and Exporters Canada
1 Nicholas St., Suite 1500
Ottawa, ON K1N 7B7
Tel.: (613) 238-8888
Fax: (613) 563-9218

Canada–Czech Republic Chamber of Commerce (CCRC)
740 Spadina Ave.
Toronto, ON M5S 2J2
Tel.: (416) 929-3432
Fax: (416) 925-1940
E-mail: trade@ccrcc.net
Internet: http://www.ccrcc.net/ccindex.html
Note: officially affiliated with Czech–North American Chamber of Commerce.

Canadian Environmental Industry Association
350 Sparks St., Suite 208
Ottawa, ON K1R 7S8
Tel.: (613) 236-6222
Fax: (613) 236-6850
E-mail: info@ceia-acie.ca

Canadian–Slovenian Chamber of Commerce
725 Brown's Line
Toronto, ON M8W 3V7
Tel.: (416) 251-8456

Canadian Standards Association
178 Rexdale Blvd.
Etobicoke, ON M9W 1R3
Tel.: 1-800-463-6727 or (416) 747-4000
Fax: (416) 747-4149
E-mail: certinfo@csa.ca

Hungarian-Canadian Chamber of Commerce
747 St. Clair Ave. W
Toronto, ON M6C 4A4
Tel.: (416) 657-0880

Standards Council of Canada
45 O'Connor St., Suite 1200
Ottawa, ON K1P 6N7
Tel.: (613) 238-3222
Fax: (613) 995-4564

Canadian Exporters Association
99 Bank St., Suite 250
Ottawa, ON K1A 0G2
Tel.: (613) 238-8888
Fax: (613) 563-9218

Foreign Embassies and Consulates in Canada

Czech Republic:

Embassy of the Czech Republic
251 Cooper St.
Ottawa, ON K2P 0G2
Tel.: (613) 562-3875
Fax: (613) 562-3878
E-mail: ottawa@embassy.mzv.cz

Czech Consulates
In Calgary:
2800, 801-6 Ave. SW
Calgary, AB T2P 4A3
Tel.: (403) 267-8432
Fax: (403) 264-9400
E-mail: 1pesta@cadvision.com

In Montreal:
1305 Pine Ave. W
Montreal, QC H3G 1B2
Tel.: (514) 849-4495
Fax: (514) 849-4117
E-mail: montreal@embassy.mzv.cz
Commercial Section:
Tel.: (514) 844-5511
Fax: (514) 844-1894

In Vancouver:
2100 - 1111 West Georgia St.
P.O. Box 48800
Vancouver, BC V7X 1K9
Tel.: (604) 661-7530
Fax: (604) 688-0829

Hungary:

Embassy of the Republic of Hungary
299 Waverley St.
Ottawa, ON K2P 0V9
Tel.: (613) 230-2717
Fax: (613) 230-7560
Internet: http://www.DocuWeb.ca/Hungary

Hungarian Honorary Consulates General
In Calgary:
1359-69 St. SW, Suite 27
Calgary, AB T3H 3W8
Tel.: (403) 252-4502 or 258-0052
Fax: (403) 262-8343

Hungarian Consulates General, cont.
In Montreal:
1200 McGill College Ave., Apartment 2040
Montreal, QC H3B 4G7
Tel.: (514) 393-1048
Fax: (514) 393-8226

In Toronto:
121 Bloor St. E, Suite 1115
Toronto, ON M4W 3M5
Tel.: (416) 923-8981/0878
Fax: (416) 923-2732

Trade Section
121 Bloor St. E, Suite 1110
Toronto, ON M4W 3M5
Tel.: (416) 923-3596
Fax: (416) 923-2097

In Vancouver:
1770 West 7th Ave., Suite 305
Vancouver, BC V6J 4Y6
Tel.: (604) 730-7321/32
Fax: (604) 730-7339

Slovak Republic:

Embassy of the Slovak Republic
50 Rideau Terrace
Ottawa, ON K1M 2A1
Tel.: (613) 749-4442
Fax: 613) 749-4989
E-mail: slovakemb@sprint.ca

Trade and Economic Section
Tel.: (613) 748-1773
Fax: (613) 748-0699
E-mail: slovaktrade@comnet.ca

Slovak Consulates:
In Calgary:
208 Scenic Glen Place NW
Calgary, AB T3L 1K3
Tel.: (403) 239-3543

In Montreal:
36 Paddington St., Dollard-Des-Ormeaux
Montreal, QC H9G 2S4
Tel.: (514) 626-9779
Fax: (514) 626-9779

In Toronto:
1280 Finch Ave. W, Suite 407
Toronto, ON M3J 3K6
Tel.: (416) 665-1499
Fax: (416) 665-7488

In Vancouver:
247 Abbot St., 2nd Floor
Vancouver, BC V6B 2K7
Tel.: (604) 682-0991
Fax: (604) 904-0301
E-mail: lisiak@lightspeed.bc.ca

In Winnipeg:
99 Grace St.
Winnipeg, MB R3B 0E4
Tel.: (204) 947-1728
Fax: (204) 947-1728

Slovenia:

Embassy of the Republic of Slovenia
150 Metcalfe St., Suite 2101
Ottawa, ON K2P 1P1
Tel.: (613) 565-5781/2
Fax: (613) 565-5783

Slovene Consulates:
In Moncton:
The Record House 93 Victoria St.
Moncton, NB E1C 1P6
Tel.: (506) 861-0300
Fax: (506) 857-8157

In Toronto:
4300 Village Centre Court
Toronto, ON L4Z 1S2
Tel.: (905) 804-9310
Fax: (905) 804-9313

In Vancouver:
3758 Quesnel Dr.
Vancouver, BC V6L 2W8
Tel.: (604) 733-0292

Government Agencies and Official Associations

Czech Republic

Association of Czech Entrepreneurs
Skretova 6
12010 Prague 1, Czech Republic
Tel.: (420-2) 2421-5373
Fax: (420-2) 2421-0434

Association of Entrepreneurs in the Environmental Protection Market
Pavlikova 601
14200 Prague 4, Czech Republic
Tel./Fax: (420-2) 472-5982

Association of Producers of Environmental Systems (APES)
Ruska 70/3
70602 Ostrava 6, Czech Republic
Tel.: (420-6) 9292-6180
Fax: (420-6) 954-380

Association of Waste Industry
Veiflikova 4
16075 Prague 6, Czech Republic
Tel.: (420-2) 2431-0368
Fax: (420-2) 324-692

Association of Wastewater Treatment Technology Experts
Areal VUT 10/V
Kravi hora
60200 Brno, Czech Republic
Tel.: (420-5) 4121-0189 ext. 320
Fax: (420-5) 750-042

Association of Water and Wastewater Providers (SOVAK)
Novotneho lavka 5
11668 Prague 1, Czech Republic
Tel.: (420-2) 2108-2346
Fax: (420-2) 2422-7836

Czech Banking Association
Vodickova 30
111 21 Prague, Czech Republic
Tel.: (420-2) 2421-5679
Fax: (420-2) 2422-5956

Czech Confederation of Industry
Mikulandska 7
11361 Prague 1, Czech Republic
External Relations Department
Tel.: (420-2) 2491-5679
Fax: (420-2) 2491-5253

Technical Co-operation Department
Tel.: (420-2) 2492-0035
Fax: (420-2) 2492-1035
Internet: http://www.spcr.cz

Czech Environmental Institute
Vrsovicka 65
10010 Prague 10, Czech Republic
Tel.: (420-2) 6712-1111
Fax: (420-2) 741-695

Czech Export Bank
Havlickova 3
11000 Prague 1, Czech Republic
Tel.: (420-2) 2167-3111
Fax: (420-2) 2421-4880
Internet: http://www.ceb.cz

Czech National Bank
Na Prikope 28
11503 Prague 1, Czech Republic
Tel.: (420-2) 2441-2061
Fax: (420-2) 2441-2179

Czech–North American Chamber of Commerce (CNACC)
Na Zlichove 21
15200 Prague 5, Czech Republic
Tel./Fax: (420-2) 541-298
E-mail: zikmunda@ceso.anet.cz

CNACC Brno Office
Tranza a.s., Czech Technology Park
List Building, Technicka 23
61600 Brno, Czech Republic
Tel.: (420-5) 414-251-10
E-mail cnaccbrno@tranza.cz
Note: North American operations are based in Atlanta, Georgia

Czech Office for Technical Standardization, Measurement and State Testing
Section for International Relations
Biskupsky dvur 5
11347 Prague 1, Czech Republic
Tel.: (420-2) 232-7884
Fax: (420-2) 232-4373

CzechInvest
Czech Agency for Foreign Investment
Stepanska 15
12000 Prague 2, Czech Republic
Tel.: (420-2) 9634-2500
Fax: (420-2) 9634-2502
Contact Mr. Rene Samek
E-mail: marketing@czechinvest.com
Internet: http://www.czechinvest.com

CzechTrade (Trade Promotion Agency)
Politickych veznu 20
P.O. Box 891
11221 Prague 1, Czech Republic
Tel.: (420-2) 2406-3084
Fax: (420-2) 2422-1575
Internet: http://www.tpo.cz

Export Guarantee and Insurance Corporation (EGAP)
Vodickova 34, P.O. Box 6
11121 Prague 1, Czech Republic
Tel.: (420-2) 2284-1111
Fax: (420-2) 2284-4001
Internet: http://www.egap.cz

General Customs Office
Budejovicka 7
14096 Prague 4, Czech Republic
Tel.: (420-2) 6133-1111
Fax: (420-2) 6133-2100

Ministry of Agriculture
Tesnov 17
11705 Prague 1, Czech Republic
Tel.: (420-2) 2181-1111
Fax: (420-2) 2481-0478

Ministry of Environment
(*Ministerstvo zivotniho prostredi*)
Vrsovicka 65
11010 Prague 10, Czech Republic
Tel.: (420-2) 6712-1111
Fax: (420-2) 6731-0308

Foreign Relations Department
Tel.: (420-2) 6712-2473
Fax: (420-2) 6731-0308

Ministry of Finance
(*Ministerstvo financi*)
Letenska 15
11810 Prague 1, Czech Republic
Tel.: (420-2) 5704-1111
Fax: (420-2) 5704-2788
Internet: http://www.mfcr.cz

Ministry of Foreign Affairs
(*Ministerstvo zahranicnich veci*)
Loretanske namesti 101/5
12510 Prague 1, Czech Republic
Tel.: (420-2) 2418-1111
Fax: (420-2) 2431-0017
Internet: http://www.mfa.gov.hu

Ministry of Industry and Trade
(*Ministerstvo prumyslu a obchodu*)
Na Frantisku 32
11015 Prague 1, Czech Republic
Tel.: (420-2) 2485-1111
Fax: (420-2) 2481-1089
Internet: http://www.mpo.cz

Ministry of Labour and Social Affairs
Na Poricnim pravu 1
12800 Prague 2, Czech Republic
Tel.: (420-2) 2192-1111
Fax: (420-2) 2192-2664

Ministry for Regional Development
Staromestske namesti 6
11015 Prague 1, Czech Republic
Tel.: (420-2) 2486-1111
Fax: (420-2) 2486-1333

National Property Fund
(*Fond narodniho majetku*)
Rasinovo nabrezi 42
12800 Prague 2, Czech Republic
Tel.: (420-2) 2491-1907 or -5348
Fax: (420-2) 2491-4388

Office of the Czech Government
(*Úrad vlády*)
Nabrezi Eduarda Benese 4
11801 Prague 1, Czech Republic
Tel.: (420-2) 2400-2111
Fax: (420-2) 2481-0231
Internet: http://www.vlada.cz

State Environment Fund
Kaplanova 1934
14000 Prague, Czech Republic
Tel.: (420-2) 6799-4302
Fax: (420-2) 793-6585

Union of Professional Unions
Skretova 6
12059 Prague 2, Czech Republic
Tel.: (420-2) 2423-0561
Fax: (420-2) 2423-0570

Hungary

Association of Environmental Consultants
Fogarasi út 125
Budapest 1141, Hungary
Tel./Fax: (36-1) 220-2367

Association for Environmentally Aware Management
Munkacsi Mihaly u 16
Budapest 1063, Hungary
Tel.: (36-1) 331-7578
Fax: (36-1) 332-0787

Association of Recyclers
Ajtosi Durer sor 5
Budapest 1146, Hungary
Tel.: (36-1) 343-0556
Fax: (36-1) 343-0985
E-mail: hoe@maildatanet.hu

Ministry of Environment
Fö utca 44-50
Budapest H-1011, Hungary
Tel.: (36-1) 457-3300
Fax: (36-1) 201-3134

Central Environment Fund
Tel.: (36-1) 457-3342
Fax: (36-1) 201-5780

Ministry of Finance
József nAdor tér 2-4
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Ministry for Industry, Trade and Tourism
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Budapest H-1051, Hungary
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Fax: (36-1) 318-4471

Ministry of Environment
Fö utca 44-50
Budapest H-1011, Hungary
Tel.: (36-1) 457-3300
Fax: (36-1) 201-3134

Central Environment Fund
Tel.: (36-1) 457-3342
Fax: (36-1) 201-5780

National Environmental Inspectorate
Fö utca 44
Budapest 1011, Hungary
Tel.: (36-1) 457-3300 or -3540
Fax: (36-1) 201-4282

Slovak Republic

Ministry of Agriculture
Dobrovicova 12
81266 Bratislava, Slovak Republic
Tel.: (421-7) 322-150, 368-510
Fax: (421-7) 361-834

Ministry of Administration and Privatization of National Property
Drienova 24
82009 Bratislava, Slovak Republic
Tel.: (421-7) 4333-0824
Fax: (421-7) 4329-4536, 4333-1214
Internet: http://www.privatiz.gov.sk

Ministry of Finance
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Tel.: (421-7) 5958-1111
Fax: (421-7) 398-042

National Bank of Slovakia
Sturova 2
81854 Bratislava, Slovak Republic
Tel.: (421-7) 5953-1111
Fax: (421-7) 5413-1167
Internet: http://www.nbs.sk

National Property Fund
Drienova 27
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Fax: (421-7) 4827-1484

Slovak Chamber of Commerce and Industry
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Slovenia

Association of Employers
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Fax: (386-61) 189-8310

Bank of Slovenia
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E-mail: fs@bsi.si

Centre for International Co-operation and Development
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Fax: (386-61) 168-1585
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Development Corporation of Slovenia
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Fax: (386-61) 189-4819

Ministry of Economic Affairs
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1000 Ljubljana, Slovenia
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Ministry of Economic Relations and Development
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Internet: http://www.sigov.si/meor/index.html

Ministry of Finance
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Internet: http://www.sigov.si/mf/index.html

Ministry of Labour, Family and Social Affairs
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1000 Ljubljana, Slovenia
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Fax: (386-61) 178-3456

Slovenian Competition Protection Office
Kotnikova 5
1000 Ljubljana, Slovenia
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Fax: (386-61) 178-3608
E-mail: andrej.plahutnik@gov.si
Internet: http://www.sigov.si/uvk

Slovenian Intellectual Property Office
Kotnikova 6
1000 Ljubljana, Slovenia
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Fax: (386-61) 178-3111
E-mail: j.kukec@sipo.mzt.si

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1000 Ljubljana, Slovenia
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Fax: (386-61) 21-6932
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Fax: (386-61) 178-3599
E-mail: tipo@gov.si
Internet: http://www.gov.si/tipo

Trade Point Slovenia
Dunajska 160
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Tel.: (386-61) 189-1800
Fax: (386-61) 189-1801
Internet: http://www.tradepoint.si

World Trade Centre
Dunajska 156
1000 Ljubljana, Slovenia
Tel.: (386-61) 188-1100
Fax: (386-61) 168-3480
E-mail: wtc-lj@wtc-lj.si
Internet: http://www.wtc-lj.si

International and Regional Institutions

European Bank for Reconstruction and Development (EBRD)
Central Europe, European Union Issues
One Exchange Square
London, UK EC2A 2JN
Tel.: (44-171) 338-6521
Fax: (44-171) 338 7199

EBRD Resident Office in the Czech Republic
Karlova 27
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Fax: (420-2) 2423-3077

EBRD Resident Office in Hungary
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Fax: (36-1) 266-6003

EBRD Resident Office in the Slovak Republic
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EBRD Resident Office in Slovenia
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European Commission in the Czech Republic
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Fax: (420-2) 2431-2850
E-mail: eumail@delcze.cec.eu.int

European Union in the Slovak Republic
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Tel.: (421-7) 5443-1736 or -2936
Fax: (421-7) 5443-2972 or -2979

International Finance Corporation
Husova 5
11000 Prague 1, Czech Republic
Tel.: (420-2) 2440-1402
Fax: (420-2) 2440-1410

Regional Environmental Centre for Central and Eastern Europe (REC)
Ady Endre út 9-11
2000 Szentendre, Hungary
Tel.: (36-26) 311-199
Fax: (36-26) 311-294
E-mail: climate@rec.org

Renaissance Fund (Office for the Czech and Slovak Republics)
Blanicka 28
12000 Prague 2, Czech Republic
Tel.: (420-2) 2225-2407
Fax: (420-2) 2225-2409

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———. *Waste Management – Hungary*, March 1, 1999.

———. *Leading Sectors for U.S. Export and Investment – Hungary*, September 4, 1999.

———. *Renewable Energy Equipment – Hungary*, January 1, 2000.

World News Connection. *Negotiator Estimates Cost of Meeting EU Environmental Standards*, May 11, 2000.

OTHER REFERENCE MATERIAL

Journals

Odpady ("Waste")
Dobrovskeho 25
17055 Prague, Czech Republic
Tel.: (420-2) 3307-1426
Fax: (420-2) 3307-2024
Monthly publication provides forum for discussions of waste-management-related issues and information on legislation, seminars, conferences and trade fairs.

Useful Internet Sites

Canadian Sites:

Canada Business Service Centres: **http://www.cbsc.org**

Canadian Business Map: **http://commercecan.ic.gc.ca**

Canadian Commercial Corporation: **http://www.ccc.ca**

Canadian Exporters Catalogue: **http://www.worldexport.com**

Canadian International Development Agency (CIDA) – Business and Development: **http://www.acdi-cida.gc.ca/busine-e.htm**

Department of Foreign Affairs and International Trade (DFAIT): **http://www.dfait-maeci.gc.ca**
DFAIT – InfoExport: **http://www.infoexport.gc.ca**

Export Development Corporation: **http://www.edc.ca**

ExportSource: **http://exportsource.gc.ca**

Industry Canada: **http://www.ic.gc.ca**

EnviroEbiz: **http://strategis.ic.gc.ca/sc_indps/environ/burst.html**
Environmental Affairs Market Information System (MIS): **http://virtualoffice.ic.gc.ca/mis**
Strategis – on-line trade data: **http://strategis.ic.gc.ca**

Northstar Trade Finance: **http://www.northstar.ca**

Statistics Canada: **http://www.statcan.ca**

European and International Sites:

Business Opportunities Exchange System (BORZA): **http://www.gzs.si/eng/borza/index.htm** (This site was set up by the Chamber of Economy of Slovenia. Slovenian and foreign firms can enter offers and demands and search the database for information and business partners.)

BusinessWeb Hungary: **http://www.businessweb.hu**

Canada-Czech Republic Chamber of Commerce: **http://www.ccrcc.net/ccindex.html**

Central and Eastern Europe Business Information Centre (CEEBICnet):
http://www.mac.doc.gov/eebic/marketr.htm

Central and Eastern Europe Regional Environmental Centre (REC): **http://www.rec.org/Default.shtml**

Central Europe Online: **http://www.centraleurope.com**

Chamber of Commerce and Industry of Slovenia: **http://www.gzs.si/eng/index.htm**

Czech Business Directory: **http://www.muselik.com/czech/business/directory/index.html**

Czech Environmental Library: **http://www.env.cebin.cz**

Czech Statistical Office: **http://www.czso.cz**

European Bank for Reconstruction and Development (EBRD): **http://www.ebrd.org**

European Commission Enlargement: **http://europa.eu.int/comm/enlargement**

European Environment Information and Observation Network (EIONET): **http://www.eionet.eu.int**

European Topic Centre on Air Emissions: **http://www.aeat.co.uk/netcen/corinair/corinair.html**

Hungarian Central Statistics Office: **http://www.ksh.hu/eng/homeng.html**

Hungarian Investment and Trade Development Agency: **http://www.itd.hu/english**

Import/Export Directory of Slovenia: **http://www.gzs.si/SLOexportA/Default.htm**

International Energy Agency: **http://www.iea.org/homechoi.htm**

International Finance Corporation (a member of the World Bank Group): **http://www.ifc.org**

International Monetary Fund (IMF): **http://www.imf.org**

Invest in Slovakia: **http://www.investinslovakia.com/fslovakia.html**

Ministry of Environment (Prague): **http://www.env.cz**

Organization for Economic Co-operation and Development (OECD): **http://www.oecd.org**

Republic of Slovenia: **http://www.sigov.si**

Slovenia Trade and Investment Promotion Office: **http://www.investslovenia.org**

Statistical Office of the Slovak Republic: **http://www.government.gov.sk/en_Welcome.shtml**

Statistical Office of the Slovenia: **http://www.sigov.si/zrs/eng/index.html**

Tenders Electronic Daily: **http://ted.eur-op.eu.int/ojs/html/index2.htm**

Trade Point Slovenia: **http://www.tradepoint.si**

United Nations Environment Program: **http://www.unep.org**
UNEP – Global Resource Information Database: **http://www.gridw.pl**

United Nations Framework Convention on Climate Change: **http://www.unfccc.de**

World Bank (International Bank for Reconstruction and Development – IBRD):
http://www.worldbank.org

READER EVALUATION

Please help the Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by fax (613) 943-1103. Thank you for your valuable input.

1. How did you obtain a copy of this market report?
   - ☐ InfoCentre FaxLink system
   - ☐ InfoCentre help line
   - ☐ Local government office
   - ☐ Government Internet site
   - ☐ Other: _____

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	☐	☐	☐	☐	☐
Complete	☐	☐	☐	☐	☐
Well organized	☐	☐	☐	☐	☐
Well written	☐	☐	☐	☐	☐
Ideal length	☐	☐	☐	☐	☐

3. In what form do you prefer to obtain these reports?
   - ☐ Print
   - ☐ Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.
   - ☐ Seek an agent/distributor
   - ☐ Visit the market
   - ☐ Do more research
   - ☐ Other: _____
   - ☐ Contact Canadian trade office abroad
   - ☐ Participate in a trade show abroad
   - ☐ Nothing

5. What other market reports would be of benefit to your organization? Please identify specific products and countries. _____

6. Which of the following categories best describes your organization? Check one only.
   - ☐ Processor/manufacturer
   - ☐ Trading house
   - ☐ Export service provider
   - ☐ Industry/trade association
   - ☐ Government
   - ☐ Student/academia
   - ☐ Consultant
   - ☐ Other: _____

7. What were your organization's total sales last year, in Canadian dollars?
   - ☐ Less than $10 million
   - ☐ More than $50 million
   - ☐ $10 million to $50 million
   - ☐ Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____